
Sustainable Business Collaboration Within the Collision Repair Industry

October 26, 2012



- A Few Things About Akzo Nobel
- Automotive Refinish Paint Life Cycle Analysis
- The Automotive Refinish Industry at a Glance
- Our Customers' Future First
- Collaboration
- Discussion



Our History

Today's largest paint and coatings company owes its existence to four legacies, dating as far back as 1646.

AkzoNobel, with operations in 80 countries and revenue close to \$20B, is a diverse organization, with a rich history and the capability to meet the demands of a rapidly evolving future.



“A Picture is Worth a Thousand Words.”

The AkzoNobel logo has its origins in a 450 BC bas relief that symbolizes both “achievement” and “striving”; with one hand in the past, and the other reaching for the future, the logo symbolizes what drives our efforts: *Tomorrow's Answers Today*.



Nobel was added in 1994



to the 1988 mark by Wolff Olins:







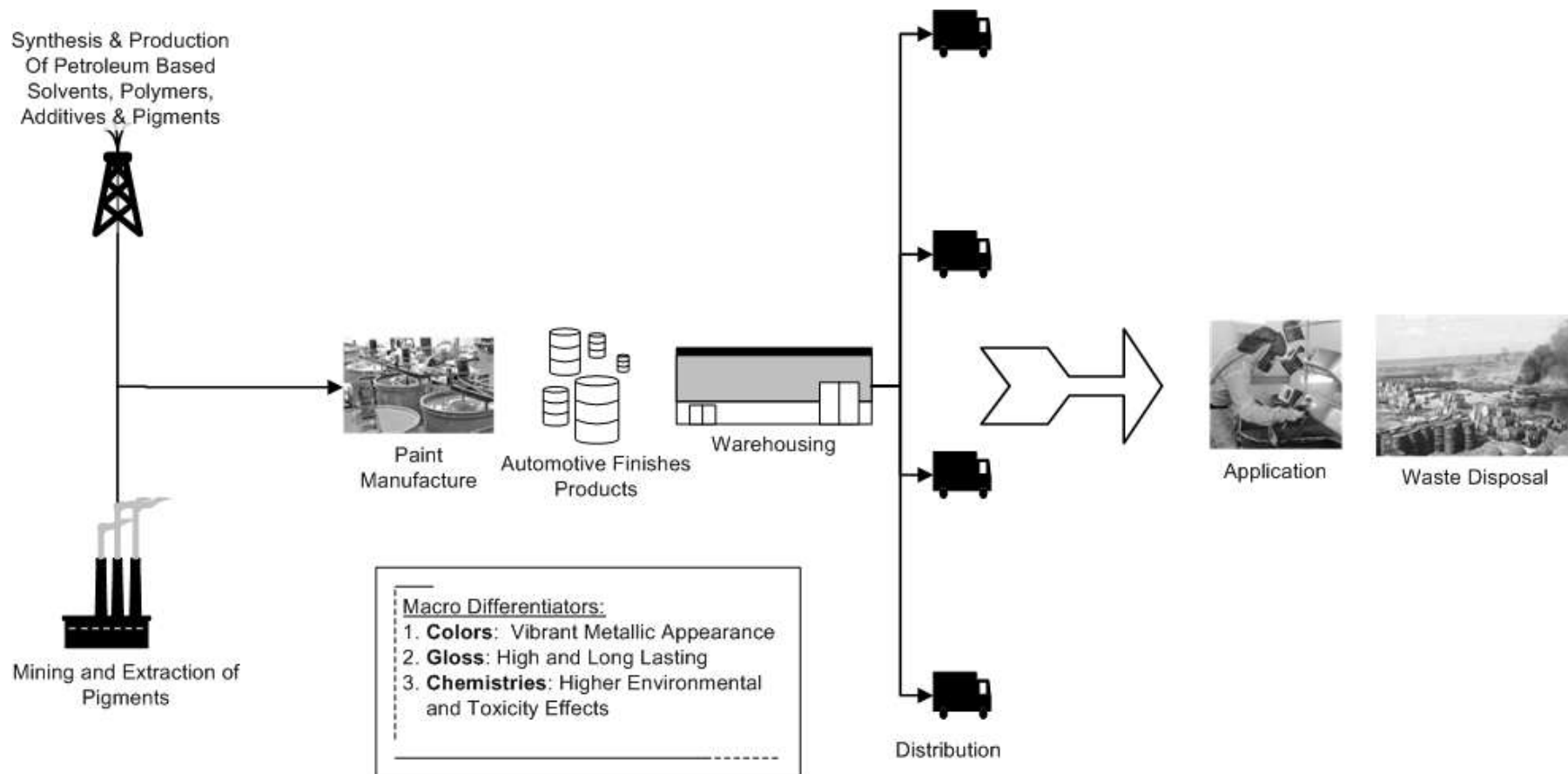


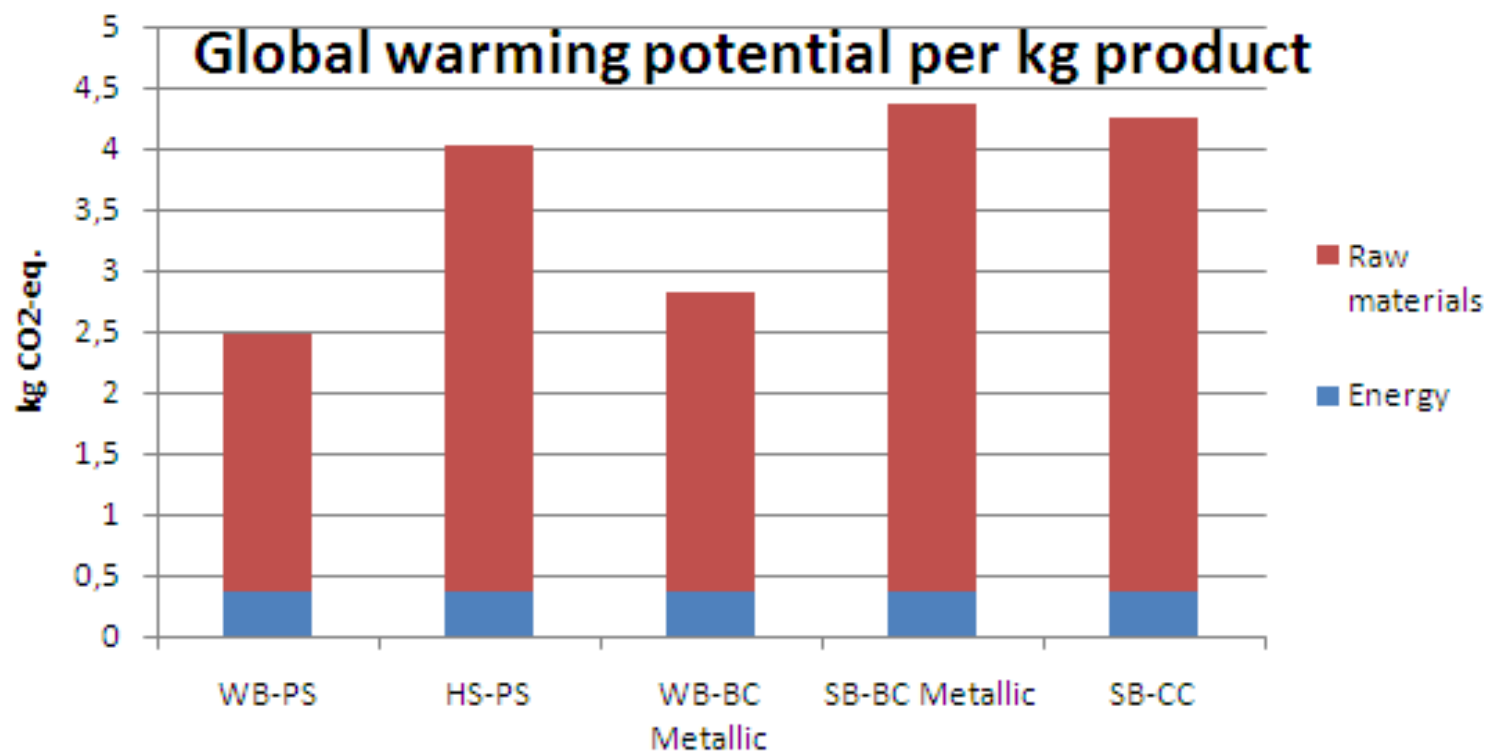
Table 1: Carbon Dioxide Equivalents for Select Automotive Refinish Products

Product Description	Kg CO2-eq. / Kg paint
Waterborne Automotive Basecoat	2.3
Solventborne Automotive Basecoat	3.6
Clear coat I	4.2
Clear coat II	4.3
Primer	2.8
Single Stage Topcoat I	4.7
Single Stage Topcoat II	4.1

Notes:

- (1) Data based on using hardeners, reducers and other ancillaries for a "ready to use" or "at the gun" product.
- (2) Transportation of the raw materials to the paint manufacturing location and transportation of the finished goods to the warehouse is included.
- (3) Packaging materials are included.
- (4) The energy input is based on using steam produced from natural gas; electricity is based on an average for all production sites.







Tomorrows Answers Today

Our values

The beliefs that underpin our business



Focus on Our
Customers' Future
First



Global Megatrends are Shaping the Future



Population growth from 6.8 billion people today to >9 billion in 2050* is a strong driver for global demand



Quality of life will improve for a new middle class of around 3 billion people emerging over the next 20 years*



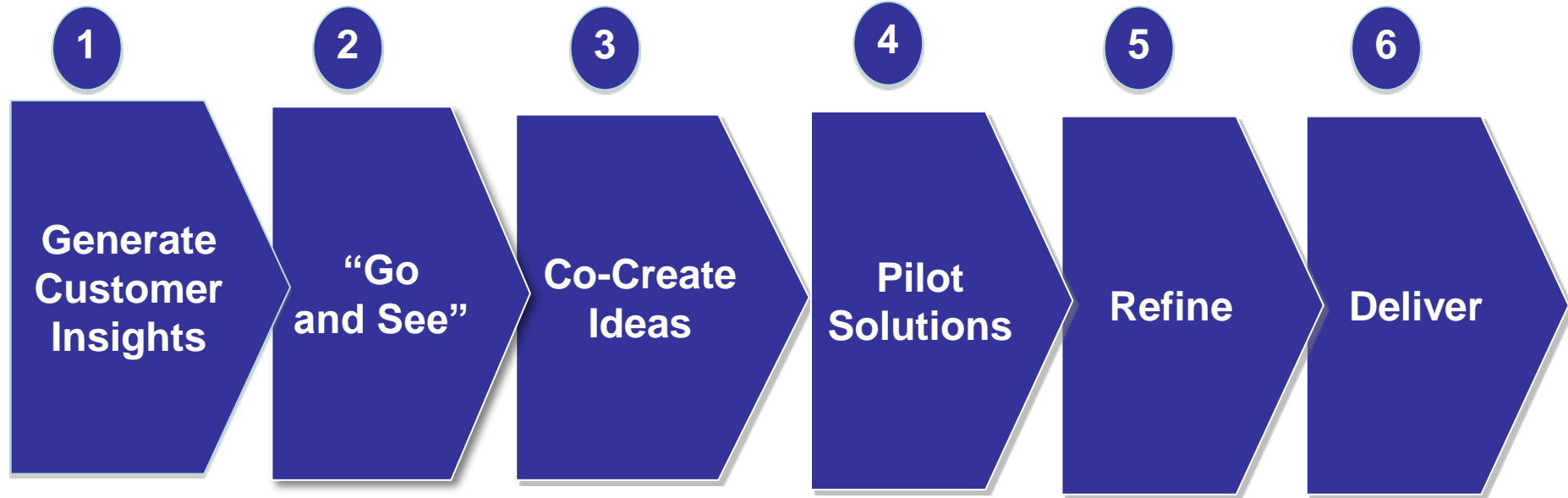
Climate change will increase the need for energy efficiency and for low carbon & renewable energy sources*



Scarcity of natural resources will drive innovation since today we already use the replenishment capacity of 1.4 planets*

* Sources: UN World Population prospects, OECD, IPCC, World resources institute, WBCSD



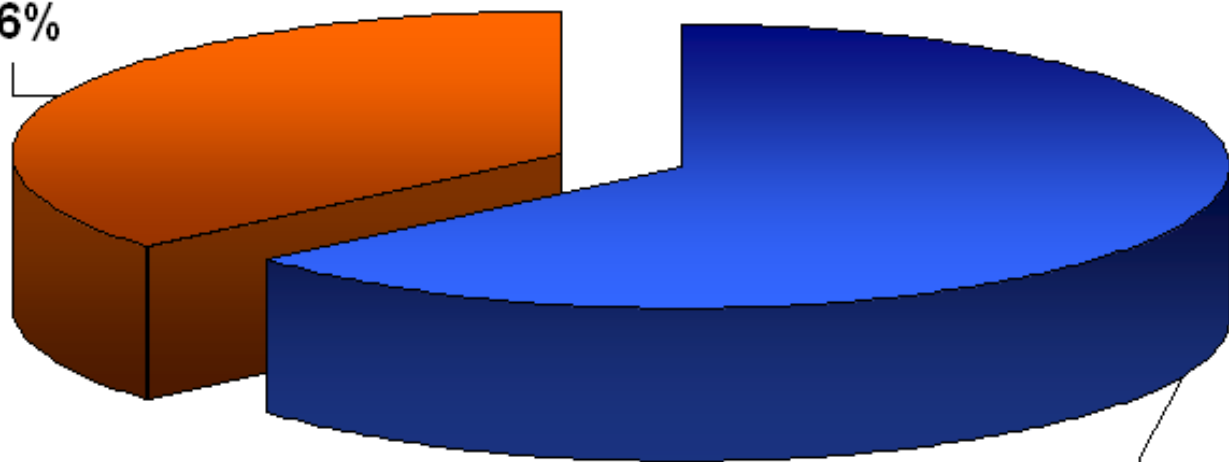


More than 60% of respondents are not paying adequate attention to the regulations that govern their operations.

How Often Does the Shop Evaluate the Legal Requirements Under which it Operates?

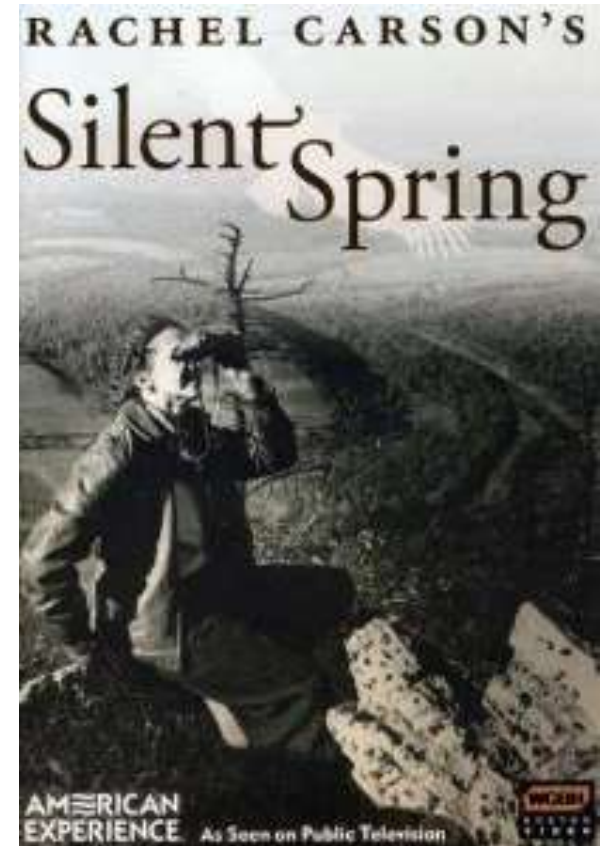
On a Regular Basis

36%



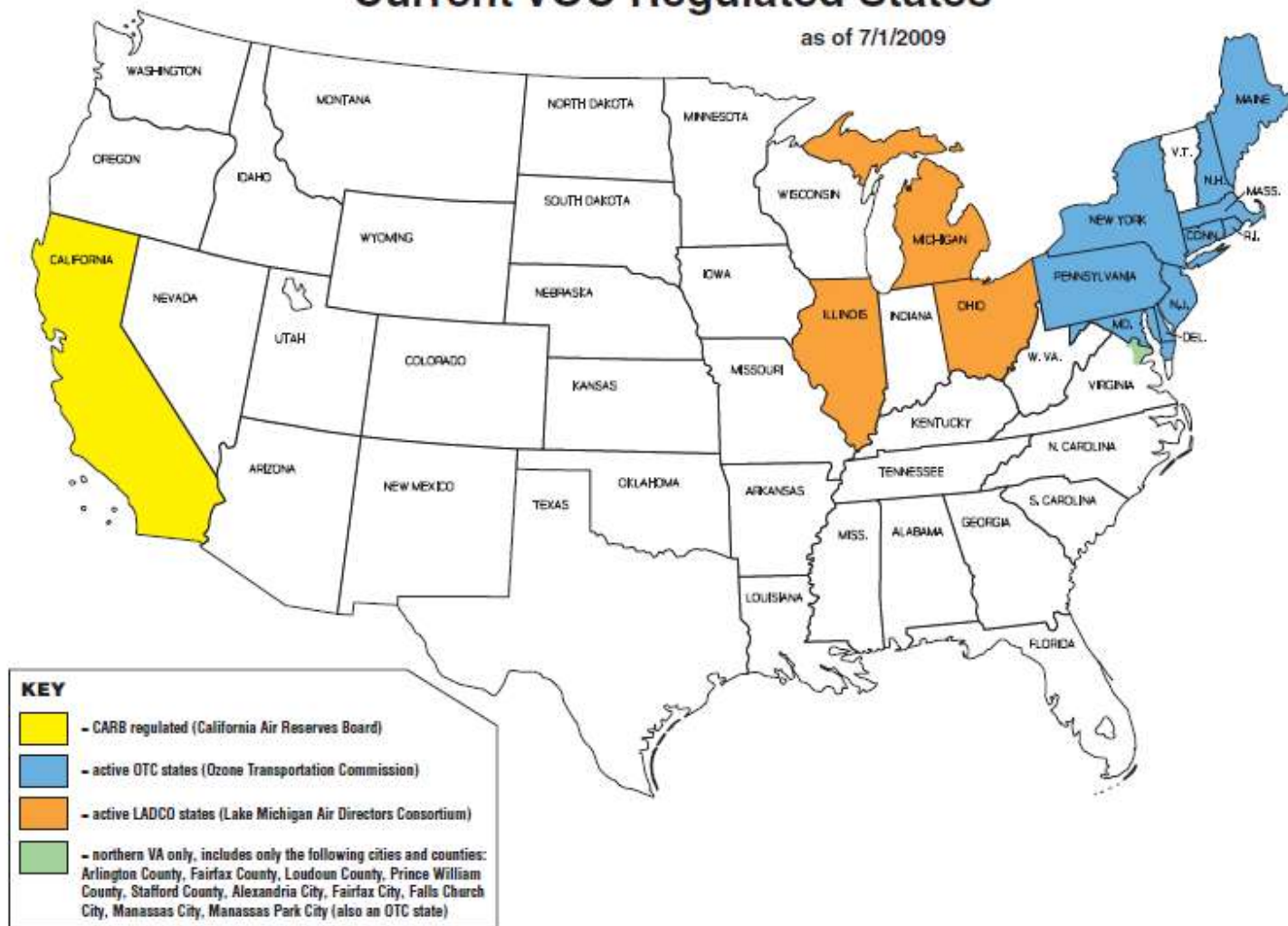
**Rarely or
Sometimes
64%**





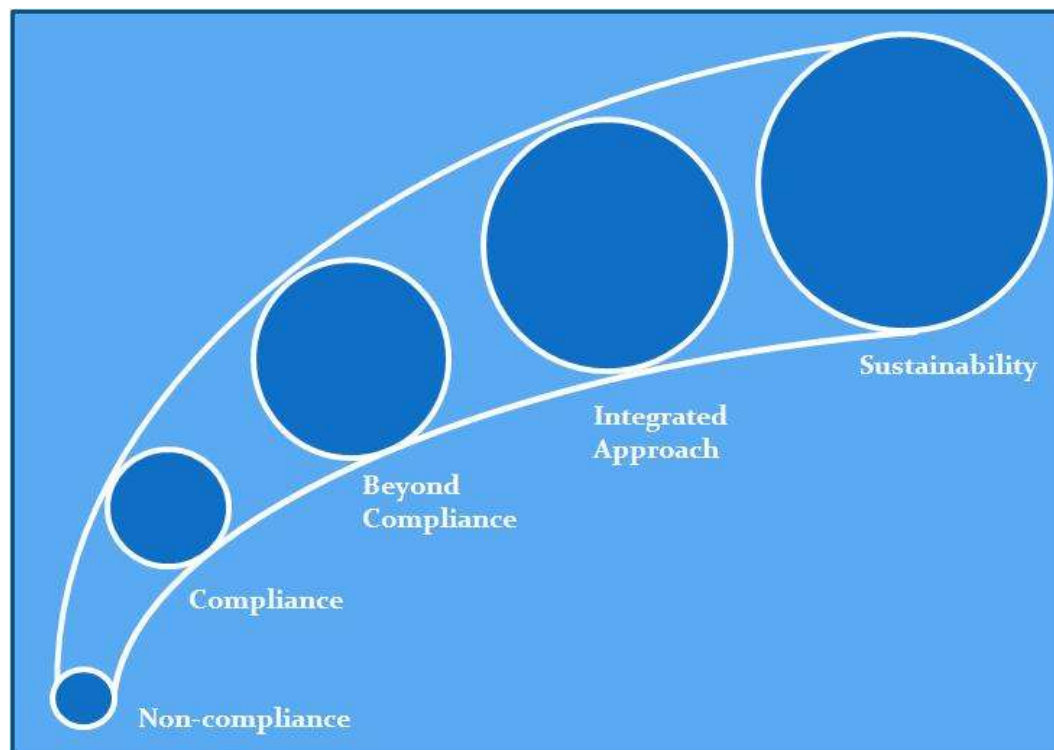
Current VOC Regulated States

as of 7/1/2009



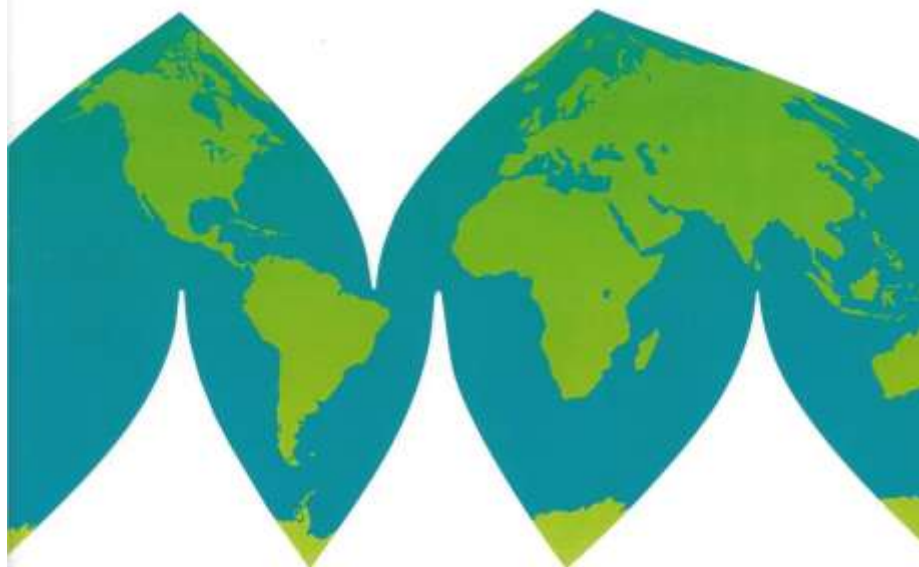
Compliance is a Minimum

Achieving sustainability follows a progression that starts with compliance to regulations at a minimum.



The name of the game is to talk to people. If you don't talk to people, you can't get started...You knock on twenty doors or so, and twenty guys tell you to go to hell, or that they haven't got time. But maybe at the fortieth or sixtieth house you find the one guy who is all you need. You're not going to organize everything; you're going to get it started.





*Welcome
Sustainability
Leadership
Symposium*



Assessment Development – Background

- *Sources for the questions*
- *Organization of the questions*
- *Rationale: Why ask these sorts of questions?*



Consolidated
Screening Checklist
for Automotive Repair
Facilities Guidebook





Course Development Committee



Back-Up Slides

